

Main job

- Analyze customer records and ensures accurate accounts set up daily in the current database and logistics
- Engaged in daily collaboration with Billing Analysts, Account Specialists, and Management to address data requirements, proactively resolve billing issues, ensure proper report functioning, and validate script programming.
- Follow-up daily with utilities regarding billing inquiries and exceptions for CCA customers and provide updates to business clients for customer service items.
- Perform correlation analysis on billing, utility, and customer service data.
- Generate and review exception reports to identify errors.

Typical Work Day

- **8:30 AM** - Start the day by reviewing emails and
- Perform **data checking, data cleaning, and corrections**
- Check and correct exceptions that are on the **report for their 2 CCA** (Community Choice Aggregation).
 - “CCA is a program that allows cities, counties and other qualifying governmental entities available within the service areas of investor-owned utilities (IOUs), to purchase and/or generate electricity for their residents and businesses.” (taken from [source](#))
- **1 PM** - Lunch
- Focus on assigned **billing batches for correlation analysis** for their 2 CCA
- **Verify data accuracy** and completeness
- Start on **missing usage projects** and collaborate.
- **5 PM** - Off work

Apps and Websites Used

- **Outlook** - To check for task updates/communicate with clients.
- **SQMD** - short for settlement quality meter data, cross-check and verify meter data accuracy
- **CAISO Metering** - Cross-validation and further accuracy verification
- **Calpine Website Tool** - Access utility data and other resources
 - Tool made in-house for employees
- **Excel** - Create tables, generate reports, and perform simple data analysis
 - Visualizations
 - Mathematical processes
- **SQL** - Programming for storing and processing data for deeper analysis
- **Microsoft Teams**- Collaboration/meetings
 - Share documents
 - Screen-share
 - Collaboration
- **Remote Desktop (Revenue Manager)** - Access the revenue management application to ensure proper billing processes are running correctly

- Can be accessed remotely
- **SDGE & Utility Websites** - Retrieve updates regarding utility data and validate them
- **Visual Cron**- Schedule and run batch processing
 - Automate reports of a batch

Pain points

- The RM app is outdated, because it was discontinued in early 2010 (around)
 - Since RM is outdated, it often freezes when working with a large usage data → very annoying
- The RM app also have some complication when it comes to the **placement of different tabs**
 - When interviewing, I noticed that they sometimes **clicked the wrong tab** within the app
 - When asked, they explain that the **tabs tend to switch position** after they switch to a different tab → inconvenience
- The toolbar in RM app confused the stakeholder because they don't know each of their function → don't have time to experiment
 - **Wished** a pop-up icon of general information of each function to enhance their experience
- Within the Webtool website of Calpine, they **can't access and view records** if SCE fails to send updates overnight, which can cause a delay in their work.
 - Additionally, if the archive process is paused or terminated overnight, they also will face the same problem.
 - They would have to wait for the software engineer to re-run the process, which can take a couple of hours
- Overall, usually no problem between RM and Webtools, but if either has a problem, then they won't have much work for the day.
 - But they would have to do double the work the next day.

Surprising points

- At the first glance of the RM app, we were very confused by their different functions, definitely not self-explanatory.
- Once the stakeholder opens RM, a page with a bunch of input text boxes pop up but they only put in the customer's account number in order to navigate to a list of customers and pick the right one. This shows that there was a lot of unnecessary input text box, making it very difficult to understand.
- More apps/websites are used on a daily basis than we had thought.